



27 Feb.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,679	(1.0) %	0.1 %
BSE SENSEX	39,889	(1.0) %	2.6 %
CNX BANK	30,307	(0.4) %	(0.1) %
CNX MIDCAP	17,512	(1.1) %	(4.5) %
CNX SMALLCAP	5,992	(0.6) %	(11.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,958	(0.5) %	(5.5) %
S&P 500	3,116	(0.4) %	(3.5) %
FTSE 100	7,042	0.4 %	(7.4) %
HANG SENG	26,696	(0.7) %	(6.5) %
NIKKEI	22,426	(0.8) %	(3.4) %
SHANGHAI COMPOSITE	2,988	(0.8) %	(3.2) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.85	0.1 %	0.9 %
EUR/USD	1.09	0.1 %	(3.2) %
GBP/USD	1.30	0.1 %	(1.6) %
USD/JPY	110.49	(1.0) %	1.7 %
USD/AUD	1.51	0.3 %	6.2 %
USD/SGD	1.40	(0.0) %	3.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	(2.3) %	(20.3) %
Gold(INR/10g)	42,530	0.5 %	9.1 %
Gold Comex(USD/oz)	1,636	(0.5) %	6.1 %
SILVER(INR/1Kg)	47,143	(1.4) %	2.4 %
Aluminium(USD/MT)	1,677	(0.5) %	(5.4) %
Copper(USD/MT)	5,614	(0.9) %	(8.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.3	(0.0) %	(0.6) %

**Global Economy:** US Commerce Department released a report on Wednesday showing new home sales in the US jumped to their highest level in over twelve years in the month of January. The report said new home sales surged by 7.9% to an annual rate of 764,000 in January. French consumer confidence remained unchanged in February, monthly survey results from the statistical office Insee showed on Wednesday. The consumer sentiment index came in at 104, unchanged from January. Singapore industrial production rose in January, data from the Economic Development Board showed on Wednesday. Industrial production increased 3.4% year-on-year in January, reversing a 3.7% drop in December. Australia total value of construction work done was down a seasonally adjusted 3% on quarter in the fourth quarter of 2019, the Australian Bureau of Statistics said on Wednesday, coming in at A\$49.773 billion, following the 0.4% decline in the three months prior. The seasonally adjusted estimate of total building work done fell 4.1% to A\$28.937 billion in the December quarter.

**Global Equities:** Asian stocks extended losses yesterday amid continued fears that the coronavirus outbreak could escalate into a pandemic. DOW also fell half a percent.

**Indian Economy:** Reserve Bank of India placed on its website a Working Paper titled "Nowcasting Indian GDP growth using a Dynamic Factor Model" under the Reserve Bank of India Working Paper Series. A core concern in policy-making is identifying the signs of expansions and contractions in economic activity. At any point in time, diverse economic activity indicators may indicate mixed trends. Therefore, combining all of these together in an appropriate way to arrive at the underlying (or unobserved) trend has traditionally occupied the attention of both governments and businesses. The paper aims to contribute to the existing literature by combining high frequency indicators, which are useful proxies of economic activity, to nowcast GDP growth of India. Domestic bond yields eased amid a sustained drop in global crude oil prices. The benchmark 10 year G sec, 6.45% bond yield closed at 6.34%, down 2 basis points on the day. Yields are lingering near a six month low.

**Equity Markets:** Domestic shares declined for the fourth straight session on Wednesday amid weak global cues. The Nifty ended below the 11,700 mark. The spread of the coronavirus has rattled investors across the globe who fear new outbreaks will push down global demand. The S&P BSE Sensex, fell 392.24 points or 0.97% at 39,888.96. The Nifty 50 index declined 119.40 points or 1.01% at 11,678.50.

**Corporate News:** IT counters could be under pressure. Indian Rupee gained impressively as a slide in crude oil worked in favor of the local currency. INR closed at 71.65 per US dollar, up 20 paise on the day. Hindustan Unilever said the National Company Law Tribunal (NCLT) Chandigarh has approved a scheme of amalgamation between GSK Consumer Healthcare and Hindustan Unilever. Adani Ports and Special Economic Zone said that it has incorporated a wholly-owned subsidiary Adani Bangladesh Ports for an authorised capital of 1 crore taka and paid-up share capital of 55 lakh taka. Shriram Transport Finance Company has raised up to Rs 500 crore by issuing bonds on private placement basis. While 3,000 debentures worth Rs 300 crore with tenure of 3 years and 1 day will carry a coupon rate of 9.50%, 2,000 debentures worth Rs 200 crore with 2 years and 2 days tenure will have a rate of 9.25% per annum.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(255.8)	116.1	47.6
MF(INR cr)	1,573.4	120.6	242.9

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	42,783	39,357	37,334
F&O(INR cr)	1,906,810	1,688,468	1,411,645

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.6	17.2	15.1
NSE VIX	18.3	0	0

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,307	(0.4) %	(0.1) %	Energy	14,190	(1.8) %	(14.2) %
IT	16,332	(1.4) %	3.1 %	Pharma	7,839	(1.3) %	(16.4) %
Metals	2,430	(1.6) %	(21.7) %	Finance	14,133	(0.7) %	13.1 %
Auto	7,208	(2.1) %	(14.3) %	PSU	2,097	(0.6) %	(38.1) %
FMCG	29,966	(0.7) %	(0.8) %	Real Estate	298	(1.7) %	11.3 %

## NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Yes Bank	37	4.0 %	(86.8) %	New India	117	(6.6) %	(38.1) %
Vodafone I	4	1.3 %	(77.5) %	GAIL (Indi)	108	(5.2) %	(39.1) %
Divi's Lab	2,142	1.2 %	24.3 %	Container	516	(4.8) %	(2.9) %
Aurobindo	510	1.2 %	(35.6) %	Motherson	111	(4.8) %	(27.6) %
Avenue Sup	2,358	1.1 %	58.0 %	Bajaj Hold	3,483	(4.4) %	3.9 %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Private Capital Expenditure (4Q)	27-02-2020	6:00	AUD	-	(0.002)
Current Account Balance (4Q)	27-02-2020	19:00	CAD	-	-
Euro-Zone M3 Money Supply (YoY) (JAN)	27-02-2020	14:30	EUR	-	0.05
Euro-Zone Business Climate Indicator (FEB)	27-02-2020	15:30	EUR	-	(0.23)
ECB's Schnabel Speaks in London	27-02-2020	15:35	EUR	-	-
ECB's Lane Speaks in Paris	27-02-2020	17:45	EUR	-	-
ECB's Guindos Speaks in Sevilla	27-02-2020	21:30	EUR	-	-
BOE's Cunliffe Speaks on a Panel in London	27-02-2020	16:00	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	27-02-2020	6:40	JPY	-	-
Trade Balance (JAN)	27-02-2020	3:15	NZD	-	-
ANZ Activity Outlook (FEB)	27-02-2020	5:30	NZD	-	17.2
Pending Home Sales (YoY) (JAN)	27-02-2020	20:30	USD	-	0.068
EIA Natural Gas Storage Change (FEB 21)	27-02-2020	21:00	USD	-	(151)
Fed's Evans Speaks in Mexico City	27-02-2020	22:00	USD	-	-
U.S. to Sell 7-Year Notes	27-02-2020	23:30	USD	-	-

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